

Data and Information Request List

To the hospital: We would appreciate receiving as much of the following information as possible (or your local sources for such information) to help us in constructing the data and fact base for as part of the strategic planning process.

We recognize that some of the information may not be readily available and that we may need to either make calculations based on your raw data, or obtain or develop this information independently.

MARKET DEFINITION AND PROFILE

- Geographic definition of the service area
 - Map of the service area with zip codes for the primary and secondary service areas
 - Number and percentage of patients (inpatient and outpatient) coming from each area
- Demographic and socioeconomic characteristics (either your data or your sources for this data)
 - Current and projected population trends
 - Distribution by age and sex categories (e.g., 0-14, 15-34, 35-44, 45-54, 55-64, 65+)
 - Economic profile and trends for the county or service area (e.g., new business starts)
- Utilization and use rate trends for the market for the last three years
 - Admissions per 1,000 population
 - Average length of stay
 - Average daily census
 - Statistics by department for the last three years (i.e., laboratory, radiology, physical therapy, ER, outpatient)
 - Admissions, discharges, births, lengths of stay, patient days for the last three years
 - Planning documents and studies (especially, the hospital's most recent strategic plan)
 - Market share studies, patient origin reports for last the three years
 - Surgeries (inpatient and outpatient) for the last three years
 - Top ten DRGs by volume and revenue
- Estimate of acute care beds in the service area: licensed and staffed

MEDICAL STAFF

- Roster by specialty, age, years in community, board eligibility, and admissions
- Pending retirements and relocations
- Top 10 admitters by specialty and individual physician

- Physician supply by specialty in the service area
- Major physician groups/organizations and practice settings
 - Group practices
 - Independents
 - Hospital/health system employed
- Location of offices: local, satellite communities, other locations (indicate owned vs. non-owned)
 - Primary care
 - Specialists

LISTING OF SIGNIFICANT COMPETITORS AND POTENTIAL COMPETITORS

- Location
- Licensed and staffed beds
- Major physician groups in the area
- Competing services and programs
- Formal affiliations with other providers (i.e., physician groups, tertiary centers)
- Participation and ownership in managed care plans
- Outpatient or ambulatory care facilities in the service area

FINANCIAL

- Last three years audited financial statements, consolidated for subsidiary operations
- Listing current key financial ratios, if available (e.g., operating margin, current ratio)
- Payor mix profile by revenue and discharges
 - Traditional commercial insurance
 - HMO
 - PPOs
 - Medicare
 - Medicaid

EMPLOYER DEMOGRAPHICS

- List of top 10 employers in the service area; including, the number of employees and location (City and Zip Code)
- Projected growth and development of the area employment base
- Travel and commute patterns in and out of the service area, if available
- Managed Care and Insurance Plans
 - Percent managed care penetration in the service area
 - Major plans and insurers (e.g., PPO, POS, HMO, Indemnity) and approximate enrollment per plan

BUSINESS UNIT PROFILES

- List of services available at or within the hospital and its subsidiaries
- Overall market share in the primary service area

KEY OPERATING TRENDS AND RATIOS

- If available, FTEs per adjusted occupied bed
- Outpatient revenue percentage
- Average cost per discharge (overall and top ten DRGs)
- Average revenue per discharge (overall and top ten DRGs)

Patient Information (From Billing Systems)

- 2-3 years information at the patient level:
 - Patient zip code
 - Date of discharge
 - Date of admission
 - Attending physician
 - Payer
 - DRG or procedure code
 - Charges

Parent Organization Reporting

- Sample reports to CHS
- List of reporting requirements
- Corporate objectives for XXX Hospital

Past Strategy or Consulting Documents

Filings with State regulatory agencies (relevant to the process)